

# **BRS Reporting System**

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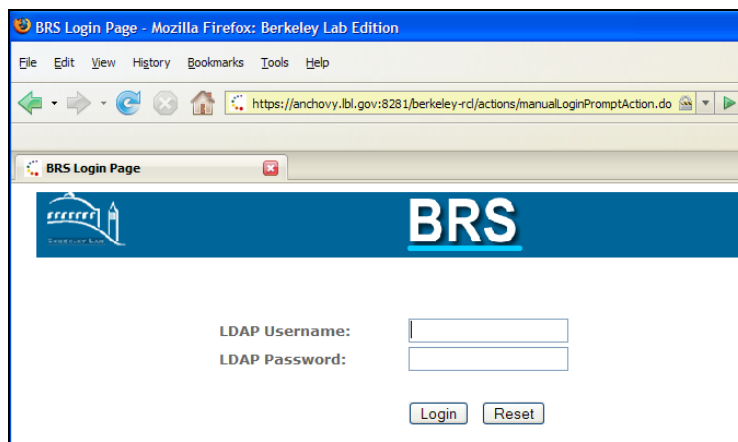
## INTRODUCTION

BRS offers standard reports for financial, HR and related business topics. Output is available in several formats including HTML, PDF, and Excel. There's a separate section for viewing output.

## ACCESS

Enter **brs** in the URL field (web address) of your browser. Then log in using your LDAP user ID and password.

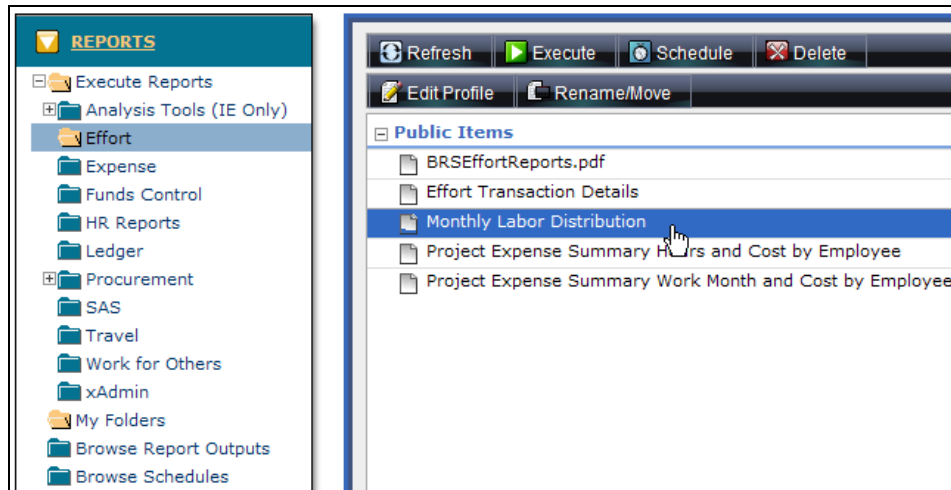
The web address is: <http://brs.lbl.gov>



**Note:** Supported browsers include Microsoft Internet Explorer and Mozilla Firefox. Due to the nature of web browsers, different behaviors may occur depending on the browser you are using.

Pop-up blockers should be turned off for BRS to operate as designed.

## QUICK START



To select, run and view a report online:

1. Select a report topic from one of the folders on the left side of the screen.
2. Double click to open the desired report profile.
3. Enter input values (organization, project ID, etc.).
4. Click RUN to submit your report request (output defaults to HTML and PDF).
5. When execution finishes, a window will automatically open (if pop-up blocker turned off).

Or navigate to Browse Report Outputs (on menu at left) to view status. When status is *Finished*, double click on the report output to view the results.

6. When reviewing report output, you can drilldown on any underlined item to get further details. When drilling, a new tab titled 'Loading' will appear in the viewer. When loading is finished, the tab label will change. Click on the new tab to view the detail.

## GETTING HELP

### Reporting Errors

Errors should be reported to BRS Support Staff immediately. In some cases, we are aware of errors that occur and we may contact you to obtain more information so that we can troubleshoot and prevent the errors from occurring in the future.

To report errors, send as much information about the error as you can to:

**brs-admin@lbl.gov**

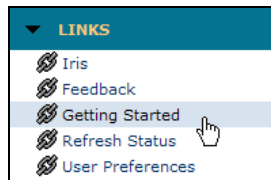
### Training

At this time, there are no formal BRS training classes offered. However, the BRS Support Staff will be more than happy to provide informal training in the form of presentations, demonstrations or one-on-one sessions as needed.

### Documentation

This documentation covers the user interface aspects of BRS. An effort is underway to provide report specific documentation in the near future.

This document is available online after logging into BRS. You can access it by clicking on Getting Started from the left menu under LINKS.



## BRS WELCOME PAGE

After you have successfully logged into BRS, you will be greeted with the BRS Welcome Page.



In the center of this page, you will find important status information:

**Data Refresh** – shows you when the data was refreshed for a subject area

**Important News** – broadcasts important messages for BRS users

On the left side of the page is the **REPORTS** menu. Here you will find everything you need to run and view reports.

The **Execute Reports** folder contains all of the public reports that are currently available in BRS are organized into subject folders. Single clicking on a subject folder will display a list of available reports. New reports are being added frequently.

The **My Folders** folder contains your private reports if you choose to save them there. Private reports is discussed later in this document.

The **Browse Report Outputs** folder contains all of your saved report outputs.

The **Browse Schedules** folder contains any reports you have scheduled to automatically run.

Below the REPORTS menu, you will find the LINKS menu. This menu contains useful links for the BRS user.

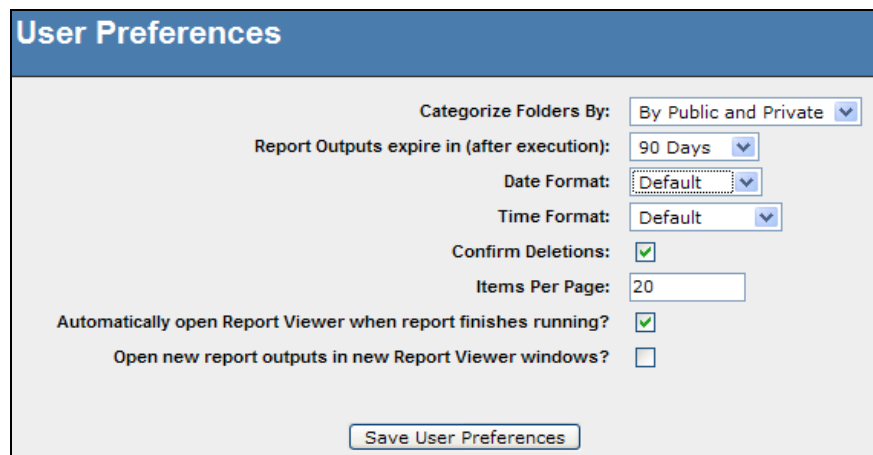
**IRIS** – Useful, if you need to access reports that have not yet been migrated to BRS.

**Feedback** – Use to send email to brs-admin@lbl.gov.

**Getting Started** – Link to this document.

**Refresh Status** – Redisplays/refreshes the BRS Welcome Page

**User Preferences** – Allows you to set some personal preferences for your BRS usage.



The screenshot shows a web form titled "User Preferences" with a blue header. The form contains several settings:

- Categorize Folders By:** A dropdown menu set to "By Public and Private".
- Report Outputs expire in (after execution):** A dropdown menu set to "90 Days".
- Date Format:** A dropdown menu set to "Default".
- Time Format:** A dropdown menu set to "Default".
- Confirm Deletions:** A checkbox that is checked.
- Items Per Page:** A text input field containing the number "20".
- Automatically open Report Viewer when report finishes running?** A checkbox that is checked.
- Open new report outputs in new Report Viewer windows?** An unchecked checkbox.

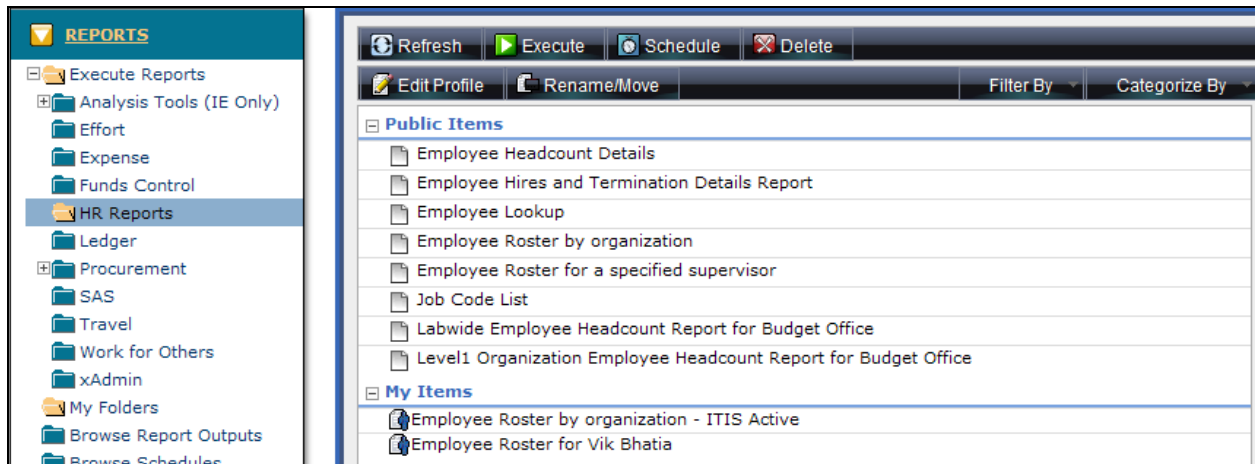
At the bottom of the form is a button labeled "Save User Preferences".

## REPORT PROFILES

**Report Profile:** You run this with your input values to produce a report output. Folders in BRS show public and private report profiles.

**Report Output:** This is the finished result of running a report profile. It can be one of multiple formats: HTML, PDF, XLS, CSV or XML.

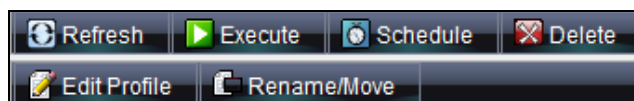
From the Reports menu on the left, click on the desired report topic to open up a list of available report profiles.



A list opens in the center window pane containing public and private report profiles for that report topic.

- **Public items** are those report profiles delivered by the system and have no input values specified (although some inputs have default values).
- **Private items** are those report profiles which have been saved by the user with their input values.
- The system defaults to show both public and private report profiles.

At the top of the Report List are buttons that allow you to take specific actions.



### Refresh

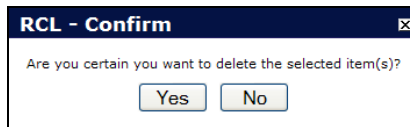
Clicking on this button will refresh the list of report profiles.

**Execute** When you highlight a report profile and click on this button, it will be submitted for execution. Use this as a shortcut to launch private report profiles, those you have saved with your inputs. You can select multiple report profiles with the Ctrl key and click on Execute to run them all.

**Note:** Submitting a public report profile this way will result in a report request with no input values that may fail or take a very long time to complete.

**Schedule** Highlight a private report profile that you would like to set up to run on a scheduled basis and click on this button. More information about scheduling reports can be found later in this document.

**Delete** Highlight a private report profile and click on this button to delete it. You will be asked to confirm the delete.



**Edit Profile** Highlight a report profile and click on this button to edit the input values and output options for the report. You can also double click the report profile to do this. This is the preferable way to run a report.

**Rename/Move** Highlight a private report profile and click on this button to move or rename it.

A dialog box titled "Rename/Move Report" with a blue header. It contains the following fields and options: "Original Name:" followed by "Employee Roster by organization - ITIS Active"; "Rename To:" followed by a text box containing "Employee Roster by organization - ITIS Active"; "Location:" followed by a dropdown menu showing "/HR Reports" and a "Browse..." button; three radio buttons for "Private\*", "Rename/Move", and "Copy", with "Private\*" selected; and a note: "\* Changing a Report from public to private will create a private copy." At the bottom are "Rename" and "Cancel" buttons.

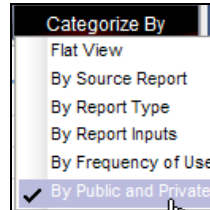


The Filter By and Categorize By options allow you to control which report profiles are displayed on the screen and in what sequence.

**Filter By:**



**Categorize By:**



The system defaults to the Flat View which displays the public report profiles followed by any private report profiles in that subject folder. You may experiment with the different views to see which you like.

## REPORT EXECUTION

To run a report, you first will need to enter your input values. Highlight a report profile and click on Edit Profile or just double click on the report profile. This will open up the Profile Wizard window.

The screenshot shows the 'Profile Wizard - Specify Parameter Values' window. It has two tabs: 'Parameters' (active, dark blue) and 'Outputs' (inactive, light blue). The title bar is 'Profile Wizard - Specify Parameter Values'. The main content area is titled 'Project Expense Summary Report (12 Months View)'. It contains several input fields: 'Project ID\*' with a text box and a list box showing '302512 - Technical Services' and '302540 - Employee Systems'; 'Start Calendar Year\*' with a dropdown set to '2006'; 'Start Calendar Month\*' with a dropdown set to 'OCTOBER'; 'Display Rolled-up Cost for Project or Direct Children Projects or Both\*' with a dropdown set to 'Both ( Project and Direct ('; and 'Display Sub-Totals\*' with a dropdown set to 'Include Sub-Totals'. At the bottom, there is a checkbox for 'Leave window open' and buttons for 'Cancel', 'Previous', 'Next', 'Run', and 'Save As'.

This window has two tabbed pages – **Parameters** and **Outputs**. The tab for the active page appears in dark blue and the inactive tab appears light blue.

You will use these pages to enter your input values and desired output preferences for your report. These are described in more detail on the following pages.

## PARAMETERS

Upon selecting a report profile for execution, the Parameters page is normally displayed. If it is not, click on the light blue Parameters tab at the top left corner of the page to activate it or click on Previous at the bottom of the page. If there is no Parameters tab, then the report profile you selected does not require any input values. An example of this is the Job Code List report in the HR Reports folder.

The Parameters page provides you with options for choosing what data you want to appear in your report and how you want to see it. Some reports may have no options and some may have many input value options. Below is an example of a Parameters page.

The screenshot shows a web-based form titled "Profile Wizard - Specify Parameter Values". It has two tabs: "Parameters" (selected) and "Outputs". The main heading is "Project Expense Summary Report (12 Months View)".

The form contains several input fields:

- Project ID\***: A text input field with a value of "302512 - Technical Services" and a dropdown menu showing "302512 - Technical Services" and "302540 - Employee Systems".
- Start Calendar Year\***: A dropdown menu with the value "2006".
- Start Calendar Month\***: A dropdown menu with the value "OCTOBER".
- Display Rolled-up Cost for Project or Direct Children Projects or Both\***: A dropdown menu with the value "Both ( Project and Direct )".
- Display Sub-Totals\***: A dropdown menu with the value "Include Sub-Totals".

At the bottom, there is a checkbox labeled "Leave window open" and a row of buttons: "Cancel", "Previous", "Next", "Run", and "Save As".




**Note:** Required input values are denoted with a red asterisk \*.

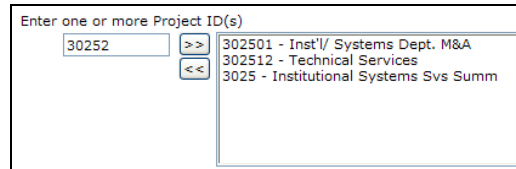
Input values have an implied “AND” relationship to one another. For example, if you select a fiscal year of 2007 and fiscal month of August and an employee ID of 012345, your report will contain data only for employee 012345 and only for August 2007.

There are several general categories of input values. Each of these is described below.



## Search and Select

They include project ID, requisition number, purchase order number, and employee ID/last name.

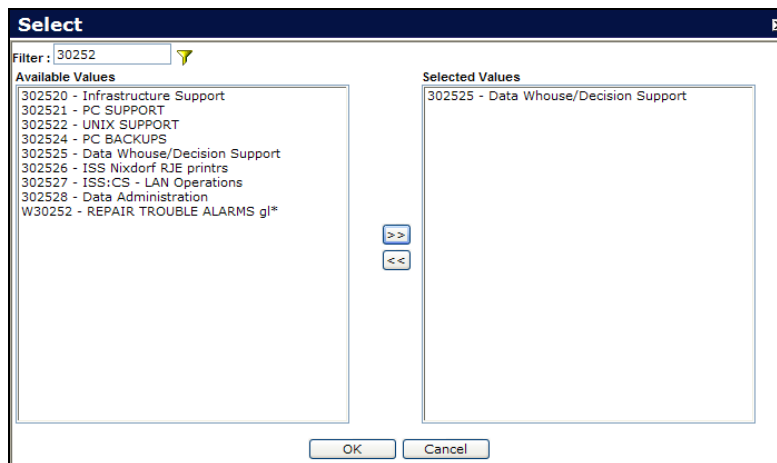
You enter a whole or partial value, and click on the  button (or press the enter key) to validate it. These are not case sensitive. If a partial value was entered, all matches are presented and you may choose the desired one. The validated value appears in the selection box to the right of the  button and you may continue to add values as desired. To remove values from the selection box, select them and press the  button.



Enter one or more Project ID(s)

30252  

302501 - Inst'l/ Systems Dept. M&A  
302512 - Technical Services  
3025 - Institutional Systems Svs Summ





**Select**

Filter: 30252

**Available Values**



- 302520 - Infrastructure Support
- 302521 - PC SUPPORT
- 302522 - UNIX SUPPORT
- 302524 - PC BACKUPS
- 302525 - Data Whouse/Decision Support
- 302526 - ISS Nixdorf RJE printrs
- 302527 - ISS:CS - LAN Operations
- 302528 - Data Administration
- W30252 - REPAIR TROUBLE ALARMS gl\*

**Selected Values**

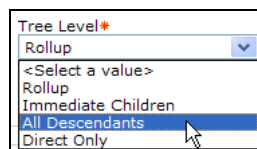
- 302525 - Data Whouse/Decision Support

OK Cancel

**Tip:** You may enter a partial value that is actually a valid project, like 3025. If you enter 3025 and click on the  button, it will validate and enter that project. But what if what you really wanted was to see all the projects that contained 3025? Simply enter 3025\* and click on the  button. Your desired list will appear.

## Drop-down List

These typically include any values for which a fairly small list can be provided and only one value in the list may be selected. Examples of drop-down lists include fiscal year, fiscal month and tree level.



Tree Level\*

Rollup

<Select a value>

Rollup

Immediate Children

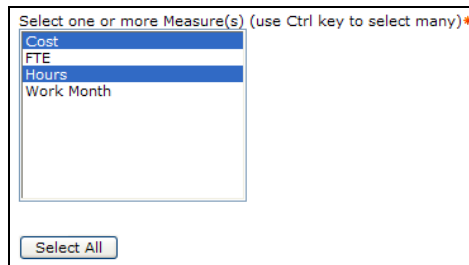
All Descendants

Direct Only

## List Box

These typically include any values for which a fairly small list can be provided and multiple values in the list may be selected. To select multiple values, hold down the Ctrl key and click on the desired value. To deselect a value, hold down the Ctrl key and click on the desired value.

Examples of list boxes include organization code or effort measures.

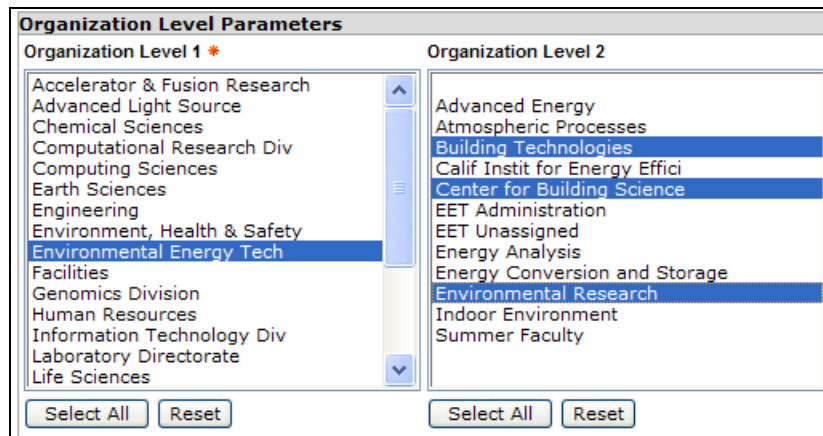


A screenshot of a list box interface. The title bar reads "Select one or more Measure(s) (use Ctrl key to select many)". The list contains four items: "Cost", "FTE", "Hours", and "Work Month". The "Cost" and "FTE" items are highlighted in blue, indicating they are selected. Below the list is a button labeled "Select All".

## Cascading Lists

Cascading lists allow you to choose a value at a higher level and then be presented with a new list of values based on it. By holding down the Ctrl key, you may then select one or more of the values.

Organization levels may be presented this way. If an entire Level 1 org is desired, do not select anything in the Level 2 org value list.



A screenshot of a dialog box titled "Organization Level Parameters". It contains two list boxes. The first list box, "Organization Level 1", has a scroll bar and shows a list of organizational units. The second list box, "Organization Level 2", shows a list of sub-units. Both lists have "Select All" and "Reset" buttons below them.

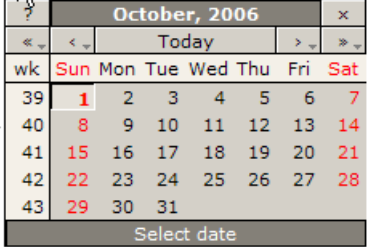
Organization Level 1	Organization Level 2
Accelerator & Fusion Research	Advanced Energy
Advanced Light Source	Atmospheric Processes
Chemical Sciences	Building Technologies
Computational Research Div	Calif Instit for Energy Effici
Computing Sciences	Center for Building Science
Earth Sciences	EET Administration
Engineering	EET Unassigned
Environment, Health & Safety	Energy Analysis
Environmental Energy Tech	Energy Conversion and Storage
Facilities	Environmental Research
Genomics Division	Indoor Environment
Human Resources	Summer Faculty
Information Technology Div	
Laboratory Directorate	
Life Sciences	

## Date

Dates are normally presented in YYYY-MM-DD format. Click on the ellipsis box next to the date to see a pop-up calendar. Blank out any default dates you do not want to use as filtering criteria.

**Date Range Parameters**

Requisition Start Date	2006-10-01	...
Requisition End Date	2007-09-30	
Purchase Order Start Date	2006-10-01	
Purchase Order End Date	2007-09-30	



The calendar shows October 2006. The days of the week are Sun, Mon, Tue, Wed, Thu, Fri, Sat. The weeks are numbered 39 to 43. The dates are: 1 (Sun), 2 (Mon), 3 (Tue), 4 (Wed), 5 (Thu), 6 (Fri), 7 (Sat), 8 (Sun), 9 (Mon), 10 (Tue), 11 (Wed), 12 (Thu), 13 (Fri), 14 (Sat), 15 (Sun), 16 (Mon), 17 (Tue), 18 (Wed), 19 (Thu), 20 (Fri), 21 (Sat), 22 (Sun), 23 (Mon), 24 (Tue), 25 (Wed), 26 (Thu), 27 (Fri), 28 (Sat), 29 (Sun), 30 (Mon), 31 (Tue). A 'Select date' button is at the bottom.

## Check Box / Radio Button

Check boxes and radio buttons may also be used to present a small number of values from which the user may choose. Typically check boxes are presented when more than one value is allowed and radio buttons are presented when only one value is allowed.

Analysis Type

- ☒ ACT
- ☐ AR
- ☐ BUD
- ☐ CAP
- ☒ COM
- ☐ REV

Consolidate Current Activity and Prior Period Adjustments \*

☐ Consolidate

☒ Do not Consolidate

## Single Value

In some cases, you are allowed to enter a single value. Whatever you enter is simply passed to the report; there is no validation. The % wildcard can be used to select a group of values that all start with the same partially-entered characters.

LDRS Key (% = wildcard, leading zeros required)

0008486186

## OUTPUTS

If the report profile you selected does not require input values, then the Outputs page is the active page displayed when you edit the profile of a report. If it is not, click on the light blue Outputs tab at the top left corner of the page to activate it or click on Next at the bottom of the page.

The Outputs page provides you with options for what to do with the report output. Most of the time you will probably not need to go to this page, the default output options will work for you.

Parameters **Outputs**

**Output Preferences (for report viewing)**

☐ Override Default Output Types? ( PDF HTML )

☐ PDF ☐ HTML ☐ XLS ☐ XML ☐ CSV

**Retention Policy**

Report Outputs expire in: Use System Default ▼

**Delivery Preferences**

☐ Email

To:

Cc:

Bcc:

Subject:

Body:

Attach (To be available, file types must be checked in Output Preferences):

☐ PDF ☐ XLS ☐ XML ☐ CSV

☐ Send report outputs in zip file

**Launch Preference**

Execute reports in: Background ▼

☐ Leave window open

Cancel Previous Next Run Save As

### Output Preferences

Report profiles automatically default to HTML and PDF outputs. If other or additional output formats are desired, check the box labeled Override Default Output Types first and then check the other output formats desired. The following example shows how to add Excel output.

**Output Preferences (for report viewing)**

☒ Override Default Output Types? ( PDF HTML )

☒ PDF ☒ HTML ☒ XLS ☐ XML ☐ CSV

**Note:** Formats that are not selected here will not be available later when viewing the report output.

When your report output appears in the Report Viewer, a drop-down list appears in the upper right corner of the screen that allows you to choose which format to view. It will default to HTML unless you specifically did not choose it. More about the Report Viewer appears later in this document.

**HTML** is best for on-screen viewing and drilling to details. The HTML output does not have any page breaks. If your report contains drill down hyperlinks, HTML output allows you to click on hyperlinks to see the detailed information. More information about drilling down is available later in this document.

**PDF** is recommended if the report will be printed. Drill down hyperlinks are not active in the PDF view. When PDF is selected, it opens in a separate browser window using the Adobe Acrobat plugin. From the Acrobat viewer, one can:

- Print the report (printer icon)
- Search for text strings within the report (binoculars icon)
- Copy sections of the report to the clipboard (camera icon)
- Save the image to disk. (when saving the report to a file, click on the diskette icon and then click "Save a Copy")

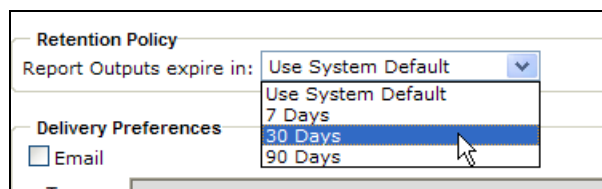
**XLS** is required if you wish to download your report to Excel.

**XML** is useful if you need your output in the form of an extensible markup language.

**CSV** is useful if you want your output in the form of comma-separated values.

## Report Retention

Report outputs are saved and will remain available for viewing for a specified time period. The original system default is 90 days; you may change the system default in User Preferences. If you wish to specify a different retention period for this report output, you must select it on the Outputs page for the report profile.



## Delivery Preferences (Email Report)

Report outputs can be emailed as email attachments. Check the Email box and enter your email information (addressees, subject and body). Check which report outputs you wish to attach. After the report profile runs, the email will be sent with the report attachments.



**Delivery Preferences**

☐ Email

To:

Cc:

Bcc:

Subject:

Body:

Attach (To be available, file types must be checked in Output Preferences):

☐ PDF ☐ XLS ☐ XML ☐ CSV

☐ Send report outputs in zip file

## Launch Preference

You may choose to run your report profile in the background or the foreground. The default is background.

**Launch Preference**

Execute reports in:

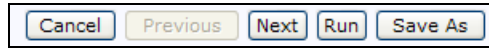
**Foreground:** After your report profile has been submitted, the Report Viewer will immediately open and you will see the rotating cube and a message that your request is executing. It will be replaced by your report output when execution has completed and it is ready for viewing.




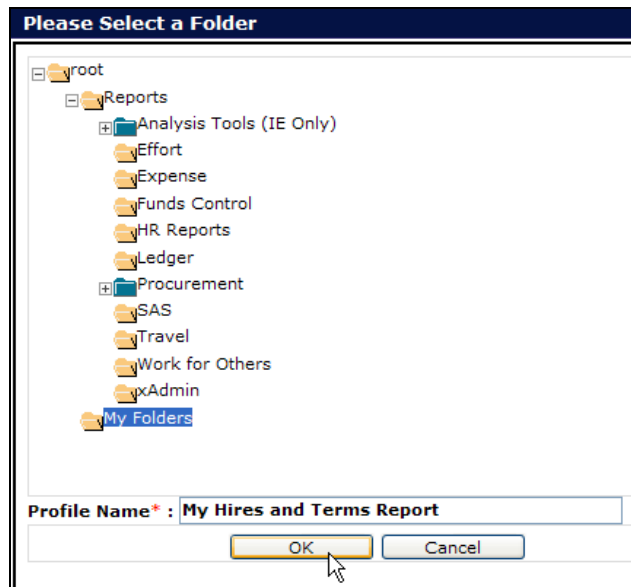
**Background:** After your report profile has been submitted, you will see nothing happen. Actually, your report is running but the Report Viewer will not open until execution has completed and the report output is ready for viewing.

## SAVING REPORT PROFILES

After you have entered all of your input values and set your output options, you are ready to run and/or save your report profile. At the bottom of both the Parameters and Outputs pages, these options are presented.



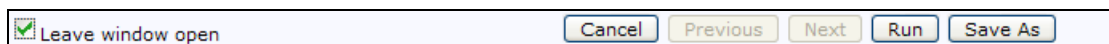
If you will run this same report profile multiple times, you should save it. The saved report profile will retain the input values and output options you entered so you will not have to re-enter them in the future. Click on the  icon to save it.



A window will pop up asking you to select the folder where you want to save the report profile. It will default to the same folder where the public report profile resides. You may save your report profile there; however, your report profile will be private and will be accessible only to you. You may also choose to save your report profile in My Folders.

After giving your report profile a name, click on OK to save it. The Profile Wizard window will close. To run your new private report profile, highlight it and click on the Execute button.

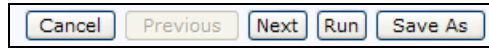
If you are not sure if you want to save your report profile, check the Leave Window Open box in the lower left corner of the page. This will keep the Report Profile Wizard window open while your report profile runs. If, after reviewing your report output, you decide to keep the profile for future use, you can go back to the window and save it. Keeping the window open is also handy for adjusting the input values and running the report profile multiple times. The window will stay open until you close it yourself.



**Note:** You also have the option of saving report profiles via the Report Viewer. This is described later in this document.

## RUNNING REPORTS

After you have entered all of your input values and set your output options, you are ready to run and/or save your report profile. At the bottom of both the Parameters and Outputs pages, these options are presented.



Click on the  icon to submit your report profile for execution. The following message will appear to indicate that it has been submitted.

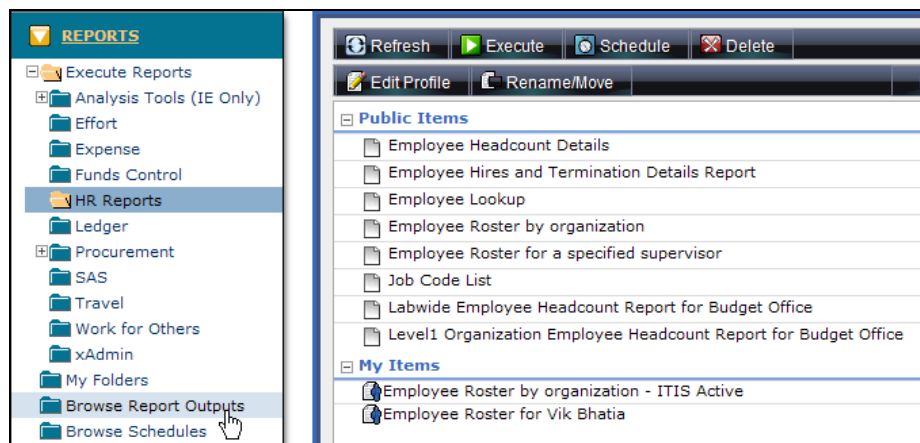


The message will fade away and the Profile Wizard window will automatically close (unless you checked the box to leave the window open).

## REPORT OUTPUT

After submitting your report profile, it may appear that nothing is happening. This is not true; in actuality your report is running in the background. This is the default behavior. If you modified the report profile to run in the foreground, the Report Viewer will open and display a message that your request is executing.

To see all of your report outputs, click on "**Browse Report Outputs**" on the left hand menu. This will open up a listing of your report outputs along with status information for each.



The report profile you just submitted will show at the top of the Report Outputs List window and will probably have a status of *Executing*.

A screenshot of a window titled 'Report Outputs List'. It has a toolbar with 'Refresh', 'View', 'Email', 'Delete', 'Cancel', 'Drill Targets', and 'View Options'. Below the toolbar are 'Re-Execute' and 'Re-Prompt' buttons. A pagination bar shows '1 / 1' with navigation arrows. The main area is a table with four columns: 'ID', 'Report Profile Name', 'Status', and 'Executed At'.

ID	Report Profile Name	Status	Executed At ▼
16909	Detailed Expense Journal	Executing	11/01/07 08:38:07 AM
16908	Employee Roster by organization - ITIS Active	Finished	11/01/07 08:27:57 AM
16907	Employee Roster by organization - ITIS Active	Finished	11/01/07 08:22:06 AM
16906	Employee Roster by organization - ITIS Active	Finished	11/01/07 08:08:33 AM
16905	Employee Lookup	Finished	11/01/07 08:00:56 AM
16904	Employee Lookup	Finished	11/01/07 07:59:41 AM
16693	Project Expense Summary by Month	Finished	10/25/07 09:09:39 AM
16692	Project Expense Summary by Resource Category Code	Finished	10/25/07 09:05:06 AM
16689	Project Expense Summary by Month	Finished	10/25/07 09:01:25 AM

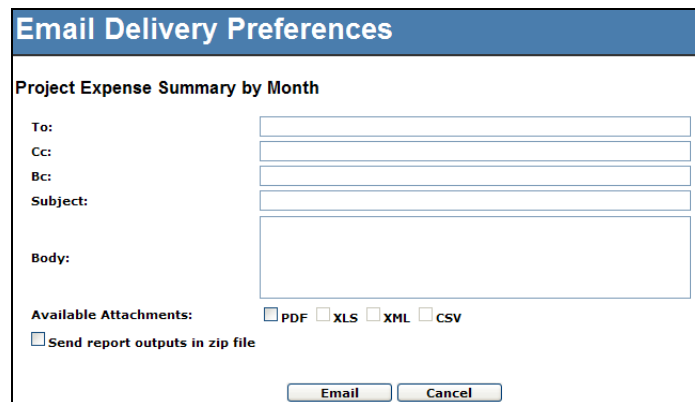
At the top of the Report Outputs List are buttons that allow you to take specific actions against the report outputs in the list.

**Refresh** Clicking on this button will refresh the list of report outputs.

**View** Highlight a report output in the list and click on this button to view it. You can also double click the report output to view it. The Report Viewer will open and the output will be displayed. If the report has not finished running, the viewer will open and you will see a message that the report is still executing.

## Email

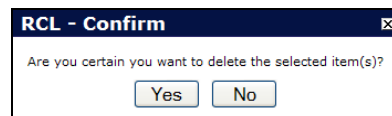
Highlight a report output in the list and click on this button to email it. A window will pop-up allowing you to enter your email delivery preferences.



The dialog box is titled "Email Delivery Preferences" in a blue header. Below the header, the text "Project Expense Summary by Month" is displayed. There are four input fields for "To:", "Cc:", "Bc:", and "Subject:". Below these is a larger text area for "Body:". At the bottom, there is a section for "Available Attachments:" with checkboxes for "PDF", "XLS", "XML", and "CSV". Below this is another checkbox labeled "Send report outputs in zip file". At the very bottom are two buttons: "Email" and "Cancel".

## Delete

Highlight one or more report outputs in the list and click on this button to delete them. A window will pop-up asking you to confirm the delete.



The dialog box is titled "RCL - Confirm" in a dark blue header. Below the header, the text "Are you certain you want to delete the selected item(s)?" is displayed. At the bottom are two buttons: "Yes" and "No".

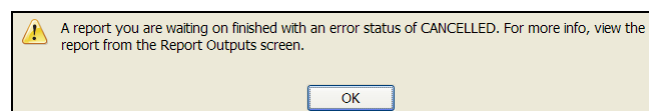
A message then appears confirming that the report outputs have been deleted and the Report Outputs List is refreshed.

Note: When you delete a report output, any drilldowns associated with it are automatically deleted.

You can also delete drilldowns; however, you must first switch to the Tree view (see View Options) to display them.

## Cancel

Highlight one or more executing request in the list and click on this button to cancel it. A window will pop-up informing you that the requests are being cancelled. When they have been cancelled, the following message will appear.



The dialog box has a yellow background and a warning icon (a yellow triangle with an exclamation mark) in the top left corner. The text inside reads: "A report you are waiting on finished with an error status of CANCELLED. For more info, view the report from the Report Outputs screen." At the bottom is a single button labeled "OK".

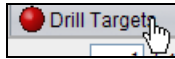
Cancelled requests remain in the Report Outputs List until you delete them.

## Re-Execute

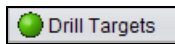
Highlight one or more report output in the list and click on this button to rerun the report profiles. A window will pop-up informing you that the requests are being submitted.

**Re-Prompt** Highlight a report output in the list and click on this button to modify input values or output preferences for that report profile. You can then resubmit the report profile and/or save it.

**Drill Targets** Drill targets are drill down report outputs. As a default you do not see these in your report outputs list. However, if you click on the Drill Targets button in the upper right corner of the screen, the drill down report outputs will appear in the list.



When the Drill Target light is red, no drill down report outputs are shown in the list; when the light is green, they are shown in the list.



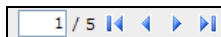
It may be hard to tell they are there because they are just listed with all the other report outputs. To show the drill targets with their parent report outputs, change the view option to the Tree view as explained next.

**View Options** The default view of the Report Outputs List is the Standard view. You can switch to the Tree view. This view is useful for viewing drilldowns which the Standard view does not show.

A screenshot of a report outputs list in Tree view. The list shows a hierarchy of report outputs. The first three items are expanded, showing their sub-items. The sub-items are indented under their parent items. A mouse cursor is pointing at the sub-item "(14482) Project Expense Summary Hours and Cost by Employee".

✓ (14521) Effort Transaction Details :: Finished :: 1189799658000 :: Imsuarez
✓ (14520) Effort Transaction Details :: Finished :: 1189799653000 :: Imsuarez
☐ ✓ (14491) Monthly Labor Distribution :: Finished :: 1189788085000 :: Imsuarez
✓ (14521) Effort Transaction Details :: Finished :: 1189799658000 :: Imsuarez
✓ (14520) Effort Transaction Details :: Finished :: 1189799653000 :: Imsuarez
✓ (14483) Project Expense Summary Work Month and Cost by Employee :: Finished :: 1189785905000 :: Imsuarez
✓ (14482) Project Expense Summary Hours and Cost by Employee :: Finished :: 118978512000 :: Imsuarez
✓ (14481) Monthly Labor Distribution :: Finished :: 1189785441000 :: Imsuarez

**Page Scroll** If you have more report outputs than can display on one page, the blue arrows under the View Options button will allow you to scroll through them a page at a time.



## REPORT OUTPUT PROPERTIES

Highlighting a report output in the Report Outputs List will display its properties in the lower half of the screen.

ID	Report Profile Name	Status	Executed At ▼
16909	Detailed Expense Journal	Finished	11/01/07 08:38:07 AM
16908	Employee Roster by organization - ITIS Active	Finished	11/01/07 08:27:57 AM
16907	Employee Roster by organization - ITIS Active	Finished	11/01/07 08:22:06 AM
16906	Employee Roster by organization - ITIS Active	Finished	11/01/07 08:08:33 AM

<b>Report Profile Name:</b> Detailed Expense Journal <b>Source Report:</b> Detailed Expense Journal <b>Report Description:</b> none	<b>Status:</b> Finished <b>Start Time:</b> 11/01/07 08:38:07 AM <b>End Time:</b> 11/01/07 08:39:30 AM
---	---

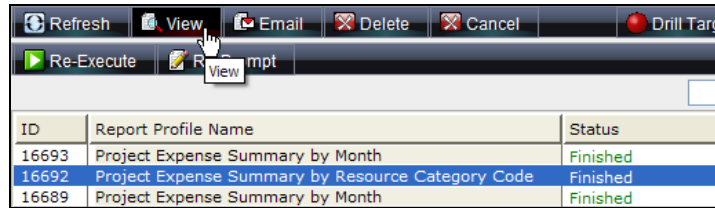
<b>Parameters</b>	<b>Available Outputs</b>																																							
<table border="1"><thead><tr><th>Parameter Name</th><th>Parameter Values</th></tr></thead><tbody><tr><td>Analysis Type</td><td>ACT COM</td></tr><tr><td>COMSupress</td><td>Yes</td></tr><tr><td>End_FM</td><td>01 - OCTOBER</td></tr><tr><td>Fiscal Year</td><td>2008</td></tr><tr><td>Project ID</td><td>302501 - Inst'l/ Systems Dept. M&amp;A</td></tr><tr><td>Project_Tree</td><td>Project and all its children projects</td></tr><tr><td>Report Summary</td><td>Include Sub-Totals</td></tr><tr><td>Rescat Code</td><td></td></tr><tr><td>ShowDecimal</td><td>Yes</td></tr><tr><td>Start_FM</td><td>01 - OCTOBER</td></tr><tr><td>consolidate_ovh</td><td>Yes</td></tr><tr><td>consolidate_proj</td><td>No</td></tr><tr><td>emp_id</td><td></td></tr><tr><td>po_id</td><td></td></tr></tbody></table>	Parameter Name	Parameter Values	Analysis Type	ACT COM	COMSupress	Yes	End_FM	01 - OCTOBER	Fiscal Year	2008	Project ID	302501 - Inst'l/ Systems Dept. M&A	Project_Tree	Project and all its children projects	Report Summary	Include Sub-Totals	Rescat Code		ShowDecimal	Yes	Start_FM	01 - OCTOBER	consolidate_ovh	Yes	consolidate_proj	No	emp_id		po_id		<table border="1"><thead><tr><th>Format</th><th>Compressed</th><th>Uncompressed</th></tr></thead><tbody><tr><td>HTML</td><td>40 KB</td><td>1,278 KB</td></tr><tr><td>PDF</td><td>141 KB</td><td>318 KB</td></tr></tbody></table>	Format	Compressed	Uncompressed	HTML	40 KB	1,278 KB	PDF	141 KB	318 KB
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Project_Tree	Project and all its children projects																																							
Report Summary	Include Sub-Totals																																							
Rescat Code																																								
ShowDecimal	Yes																																							
Start_FM	01 - OCTOBER																																							
consolidate_ovh	Yes																																							
consolidate_proj	No																																							
emp_id																																								
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<b>Execution Statistics</b>																						
<table border="1"><thead><tr><th>State</th><th>Seconds</th></tr></thead><tbody><tr><td>Pending Pre-Execution</td><td>0</td></tr><tr><td>Pre-Execution</td><td>2</td></tr><tr><td>Pending Execution</td><td>0</td></tr><tr><td>Execution</td><td>76</td></tr><tr><td>Pending Download</td><td>2</td></tr><tr><td>Download</td><td>3</td></tr><tr><td>Pending Post Execution</td><td>0</td></tr><tr><td>Post Execution</td><td>0</td></tr><tr><td>Total Time</td><td>83</td></tr><tr><td>Failed Attempts</td><td>0</td></tr></tbody></table>	State	Seconds	Pending Pre-Execution	0	Pre-Execution	2	Pending Execution	0	Execution	76	Pending Download	2	Download	3	Pending Post Execution	0	Post Execution	0	Total Time	83	Failed Attempts	0
State	Seconds																					
Pending Pre-Execution	0																					
Pre-Execution	2																					
Pending Execution	0																					
Execution	76																					
Pending Download	2																					
Download	3																					
Pending Post Execution	0																					
Post Execution	0																					
Total Time	83																					
Failed Attempts	0																					

Create Incident Report

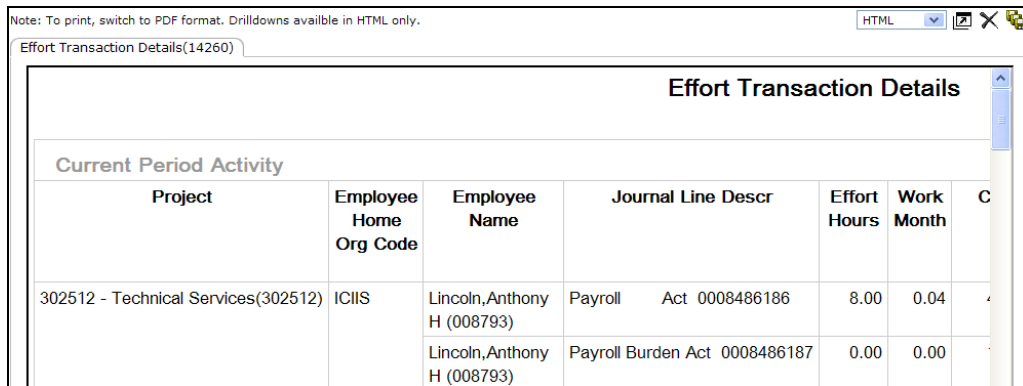
## VIEWING REPORT OUTPUT

To view a report output, double click on the desired report output in the Report Outputs List or highlight it and click on the View button.



ID	Report Profile Name	Status
16693	Project Expense Summary by Month	Finished
16692	Project Expense Summary by Resource Category Code	Finished
16689	Project Expense Summary by Month	Finished

The Report Viewer will open. If HTML output exists, the viewer will automatically launch it. If there are drilldown targets associated with it, they will also be loaded and displayed in separate tabs.



Note: To print, switch to PDF format. Drilldowns available in HTML only.

Effort Transaction Details(14260)

Effort Transaction Details						
Current Period Activity						
Project	Employee Home Org Code	Employee Name	Journal Line Descr	Effort Hours	Work Month	C
302512 - Technical Services(302512)	ICIIS	Lincoln,Anthony H (008793)	Payroll Act 0008486186	8.00	0.04	
		Lincoln,Anthony H (008793)	Payroll Burden Act 0008486187	0.00	0.00	

If there is no HTML output but there is PDF output, the viewer will display the PDF output.

If neither HTML or PDF output exists, the Report Viewer will open but no report output will be displayed. Instead a download window will appear asking if you wish to save the report output to a file or open it in another application.

Note: You may highlight more than one report output. They will all be loaded into the viewer and displayed in separate tabs.



## Changing Output Format

If your report has multiple outputs (such as HTML and PDF), you can change which one is displayed. To change to an alternate output format, select one from the drop-down menu in the upper right corner of the report.

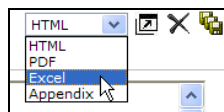


- **HTML** is best for viewing online and must be used for drilling down.
- **PDF** is best for printing. When selected, Acrobat Reader is opened with the viewer and you will have options to print or save it.
- **XLS** formatted report outputs do not appear in the viewer, download options will appear when these are selected.
- **Appendix** is currently not being used. It is used to append the report properties (described above) to the end of the report. This feature was turned off as it can affect report execution performance; however, it still appears in the drop-down when there is HTML output and simply shows a blank page when selected.

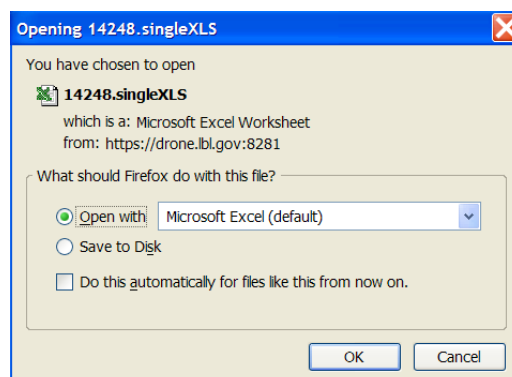
## Downloading Excel Output

Depending on security, the download of the file might be blocked by your pop-up blocker. Check the top bar to be able to select the option to download the file.

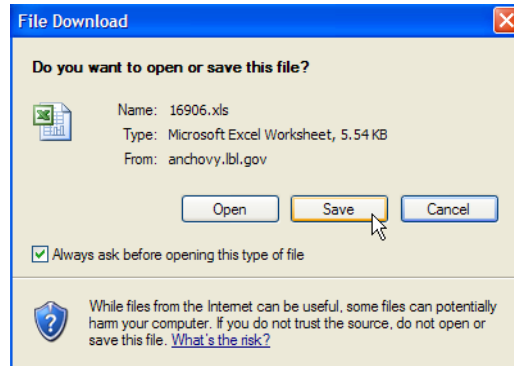
Your experience with downloading the Excel may differ depending on the browser you are using.



In Firefox, you may see the following window and can choose to run Excel or save the Excel-formatted report.



In Internet Explorer, you will be asked if you want to open or save the file. You should choose to save it to a folder of your choosing on your workstation. You can then use Excel to open the saved file.



If you choose to open it instead of save it, Excel may open in the Report Viewer. This is not desirable as you do not have any options to save it from within the viewer.

## Viewing Other Output Formats

CSV formatted output will be treated similarly to the XLS output. You will be asked if you want to open it in Excel or save it.

XML formatted output is automatically opened in the Report Viewer. Unfortunately, there are no options to save it.

## Drilling Down to Details

Some reports have been designed to provide additional details via hyperlinks. These hyperlinks can be invoked to launch related reports, also called **Drill Targets**. Any hyperlinked value in a report may be drilled down to details.

**Note:** You must use the HTML output version of the report to invoke drill targets. Hyperlinks in PDF outputs are not active by design.

https://drone.lbl.gov:8281 - RCL Report Viewer - Mozilla Firefox

PES - 3... Loading... 2. Drill target report launches in a new tab

HTML

**Project Expense Summary By Month**  
Period Range: 2005/OCT to 2006/SEP Fiscal Period: 2006/1 to 2006/12 Jun VBhatia

1. Click on a hyperlink

Project(s): 3025 - Institutional Systems Svs Summ

Links to Expense Reports: [Resource Category Hierarchy](#) [Resource Category Code](#) [Purchase Order](#) [Travel](#)  
Links to Effort Reports: [Cost & Effort Hours By Employee](#) [Cost & Work Month By Employee](#)

Numbers shown are total rolled-up cost by project tree

Project	Total Cost	OCT	NOV	DEC	JAN	FEB	MAR	APR	MAY	JUN	JUL	AUG
3025 - Institutional Systems Svs Summ	3,274,226	227,021	415,390	283,350	312,391	440,229	434,516	467,237	482,481	211,611		
Summary	3,274,226	227,021	415,390	283,350	312,391	440,229	434,516	467,237	482,481	211,611		

Project Details

Project	Total Cost	OCT	NOV	DEC	JAN	FEB	MAR	APR	MAY	JUN	JUL	AUG
3025 - Institutional Systems Svs Summ												

You may launch multiple drill targets. Each will open in a separate tab in the Report Viewer.

## Additional Viewer Options

Several additional options are available to you in the Report Viewer. These are displayed in the upper right corner of the viewer screen:



Clicking on this icon will detach the currently selected tab and open it in its own viewer window. Handy if you want to see reports and drill downs in separate windows.



Clicking on this icon allows you to close the currently selected tab. This does not delete the output / drill target.



Clicking on this icon allows you to save this report's profile so that you can run the report in the future without having to re-enter the input values.

# MANAGING REPORT OUTPUT

## Deleting Report Output

By default, report outputs are automatically purged by BRS according to the retention period you selected. The system default is 90 days.

You may explicitly delete a report output by highlighting it and then clicking on the Delete button. You will be asked to confirm the delete. The output will be deleted and the Report List window will refresh.

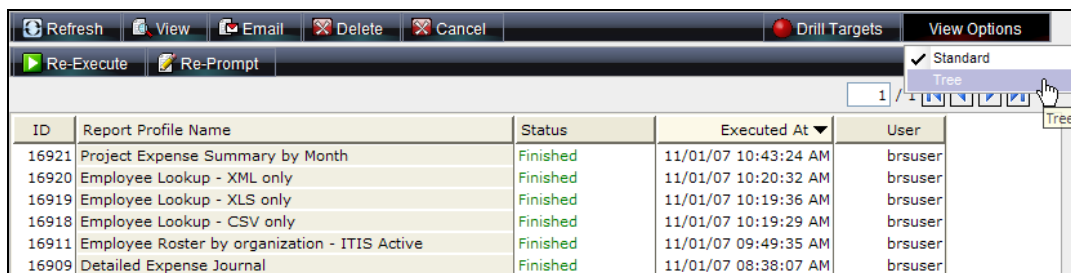
When you delete a parent report output, all associated drill targets are deleted without a warning. You can delete drill targets individually by switching to the Tree view and selecting only the drill targets you wish to delete. You can also delete them from within the Report Viewer.

Note: Report outputs, once deleted, cannot be recovered easily.

## Managing Drill Output

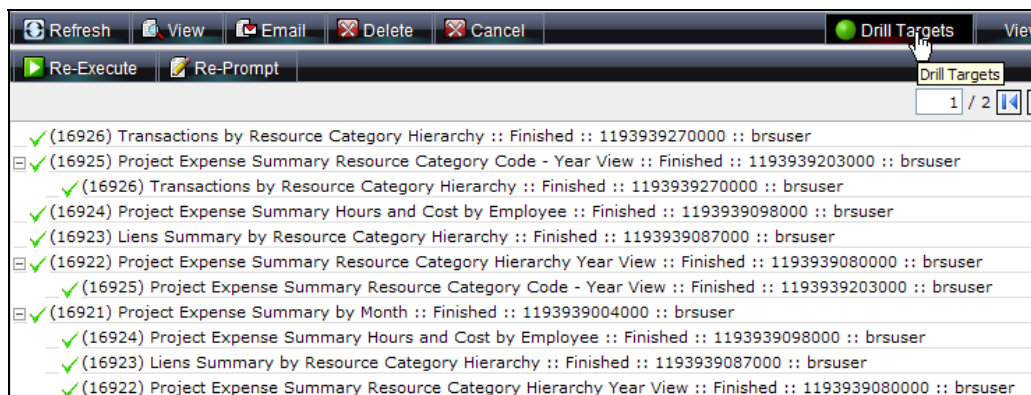
By default, the Report List window shows only the parent report outputs (Standard view). When you open a parent report output for viewing, all associated drill targets are also opened (unless you deleted some/all explicitly) in their respective tabs.

To view a list of parent report outputs and their drill targets, you must first switch to the Tree view.



ID	Report Profile Name	Status	Executed At	User
16921	Project Expense Summary by Month	Finished	11/01/07 10:43:24 AM	brsuser
16920	Employee Lookup - XML only	Finished	11/01/07 10:20:32 AM	brsuser
16919	Employee Lookup - XLS only	Finished	11/01/07 10:19:36 AM	brsuser
16918	Employee Lookup - CSV only	Finished	11/01/07 10:19:29 AM	brsuser
16911	Employee Roster by organization - ITIS Active	Finished	11/01/07 09:49:35 AM	brsuser
16909	Detailed Expense Journal	Finished	11/01/07 08:38:07 AM	brsuser

Then click on the Drill Targets button. When you do this, the red dot will change to green and the screen will refresh, now displaying all the drill target outputs.



✓ (16926) Transactions by Resource Category Hierarchy :: Finished :: 1193939270000 :: brsuser
⊟ ✓ (16925) Project Expense Summary Resource Category Code - Year View :: Finished :: 1193939203000 :: brsuser
✓ (16926) Transactions by Resource Category Hierarchy :: Finished :: 1193939270000 :: brsuser
✓ (16924) Project Expense Summary Hours and Cost by Employee :: Finished :: 1193939098000 :: brsuser
✓ (16923) Liens Summary by Resource Category Hierarchy :: Finished :: 1193939087000 :: brsuser
⊟ ✓ (16922) Project Expense Summary Resource Category Hierarchy Year View :: Finished :: 1193939080000 :: brsuser
✓ (16925) Project Expense Summary Resource Category Code - Year View :: Finished :: 1193939203000 :: brsuser
⊟ ✓ (16921) Project Expense Summary by Month :: Finished :: 1193939004000 :: brsuser
✓ (16924) Project Expense Summary Hours and Cost by Employee :: Finished :: 1193939098000 :: brsuser
✓ (16923) Liens Summary by Resource Category Hierarchy :: Finished :: 1193939087000 :: brsuser
✓ (16922) Project Expense Summary Resource Category Hierarchy Year View :: Finished :: 1193939080000 :: brsuser

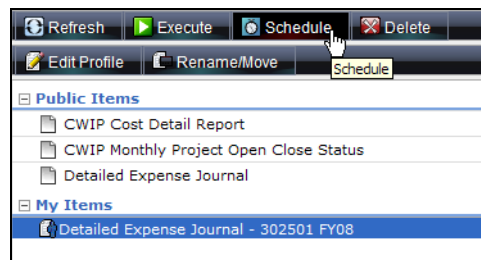
## SCHEDULING REPORTS

You can schedule private report profiles to automatically run on a periodic basis, such as every week or once a month. You can schedule these and forget about them; that is, until you are ready to view their outputs.

**Note:** Do not schedule public report profiles as these may fail or take a very long time to run because no input values have been entered for them.

### Schedule Report

Highlight the private report profile and click on the Schedule button.



The Schedule Wizard window will open with two tabbed pages – **Type** and **Timing**.

### Type

On this page, you will need to enter a name for the scheduled report and choose how often it is to run. Your highlighted report profile already appears as the selected report, but you can change this if you want to.

A screenshot of the 'Schedule Wizard - Specify Name and Type of Schedule' window. The window has two tabs: 'Type' (selected) and 'Timing'. The 'Name' field contains 'Detailed Expense Journal - 302501 FY08'. The 'Type' section has radio buttons for 'Once', 'Daily', 'Weekly', 'Monthly' (selected), and 'Yearly'. The 'Folders' section on the left shows a tree view with 'Reports' expanded, containing sub-folders like 'Analysis Tools (IE Only)', 'Effort', 'Expense', 'Funds Control', 'HR Reports', 'Ledger', 'Procurement', 'SAS', and 'Travel'. The 'Available Reports' section in the middle lists 'CWIP Cost Detail Report', 'Detailed Expense Journal', and 'Detailed Expense Journal - 302501 FY08'. The 'Selected Reports' section on the right contains 'Detailed Expense Journal - 302501 FY08'. At the bottom, there are buttons for 'Cancel', 'Previous', 'Next', and 'Save'.

Once you have entered the desired information, click on the Timing tab or the Next button to go to the Timing page.

## Timing

On this page, you will need to enter more detailed information about when you want your private report profile to run. In this example, the report is being scheduled to run once a month at 12:05 pm starting on November 1, 2007 and running every month (with no end date).

Schedule Wizard - Specify when the scheduled reports should execute

Type **Timing**

☐ The First Sunday of every 1 month(s)  
☒ Day 1 of every 1 month(s)

Start Date: 2007-11-01 Start Time: 12:05 PM

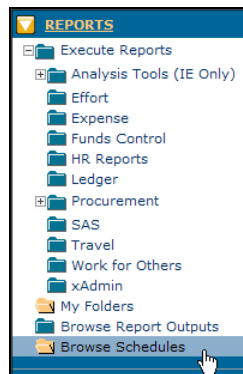
☒ Run until deleted.  
☐ End Date:

Cancel Previous Next Save







When you are satisfied with what you have entered, click on the Save button to save it. It will begin running automatically according to the schedule.

## Browse Schedules

To view all of your schedules, click on the **Browse Schedules** folder under **REPORTS** on the left menu.



A list of schedules will appear in the center pane window.

<div><div> Refresh</div><div> Run</div><div> Pause</div><div> Resume</div><div> Edit</div><div> Delete</div></div>				
ID ▼	Schedule Name	Status	Previous Run	Next Run
201	Detailed Expense Journal - 302501 FY08	Normal	No previous runs.	11/01/07 12:05:00 PM

At the top of the Schedules List are buttons that allow you to take specific actions against the schedules in the list.

- |                |   |
|----------------|---|
| <b>Refresh</b> | Clicking on this button will refresh the list of reports.   |
| <b>Run</b>     | If you highlight a schedule and click on this button, the report will be submitted for execution immediately.   |
| <b>Pause</b>   | Highlight a schedule and click on this button to suspend it. The report will not run again until the schedule is resumed. After pausing a schedule, click on the Refresh button to verify that the status of that schedule is <i>Paused</i> . |
| <b>Resume</b>  | Highlight a paused schedule and click on this button to re-activate the schedule. Click on the Refresh button to verify that the status of that schedule is Normal.   |
| <b>Edit</b>    | Highlight a schedule and click on this button to modify the schedule.   |
| <b>Delete</b>  | Highlight a schedule and click on this button to delete a schedule.   |

Last Page of Document